



# **Substance Abuse and Crime Prevention Act SACPA Reporting Information System**

## **User Manual**

**Updated: August 28, 2003**



## Table of Contents

<b>Part One: Introduction</b>	1
About this Application	1
About this Document	2
Accessing the SRIS	2
Getting Help	2
Obtaining user Name and Password	2
Logging on to the SRIS	2
Changing Your Password	6
Logging Out of the SRIS	7
Commonly Used Features	8
User Hints	9
 <b>Part Two: Lead Agency Information</b>	 11
Inputting Lead Agency Information	11
Verifying Lead Agency Information	11
Updating Existing Contact Information	11
Adding a New Contact	13
Entering and Updating Lead Agency Roles	15
 <b>Part Three: County Plan Submission</b>	 20
Getting Started	20
Setting Up the Fiscal Year	20
Creating a County Plan	22
Using a Blank Template	22
Using an Existing County Plan to Create a New One	25
Viewing or Updating a County Plan	28
County Plan Version	31
County Plan Revision	33
Viewing or Updating County Plan Revisions	36
County Plan Status	38
Updating a County Plan Status	39
County Plan Entity Information	41
Deleting County Plan Entity Line Items	45
County Plan Service/Activity Information	45
County Plan Capacity Projection Information	50
County Plan Client Projection Information	53
County Plan Questions Page	57
County Plan Description Files	57
How to Attach a File	57
How to View a File	59
How to Download a File	59
How to Delete a Document	59
Deleting a County Plan	60



<b>Part Four: Expenditures, Client Counts, and Wait List</b>	<b>63</b>
Getting Started	63
Creating a County Expenditure Report	63
Using a Blank Template	63
Creating from an Existing County Plan or Expenditure Report	67
Updating and Viewing Existing Expenditures, Client Counts and Wait List Report Information	70
Updating Expenditure, Client Counts and Wait List Report Status	72
Deleting Expenditure, Client counts and Wait List Report	75
Deleting a County Expenditure Report Entity Information Line Item	77
Detailed Explanation of Required Expenditures, Client Counts and Wait List Report Data	80
Case Management and Other Service Client Counts	84
Other Services Waiting List Counts Information	85
 <b>Part Five: Financial Status Report</b>	 <b>87</b>
Creating a New Financial Status Report	87
Using a Blank Template	87
Using an Existing Financial Status Report	91
Viewing or Updating an Existing Financial Status Report	93
Financial Status Report Status	97
Updating Financial Status Reports	98
Adding Financial Status Report Approvals	101
Financial Status Report Information	103
Deleting Financial Status Report Information	104
 <b>Part Six: General Reporting Functions:</b>	 <b>108</b>
Generating a Report	109
 <b>Appendix A</b>	 <b>111</b>
<b>Appendix B</b>	<b>114</b>



## Part Two: Lead Agency Information

### Inputting Lead Agency Information

This Section of the manual discusses Lead Agency Information. It explains how to add, verify, and update Lead Agency and County Contact Information.

### Verifying Lead Agency Information

The name and address of the Lead Agency will automatically be displayed in the County Information section. Counties cannot update this information. Only ADP has the authority to update Lead Agency information. If the information displayed is incorrect, please contact your ADP analyst.

### Updating Existing Contact Information

You may review and update the Contact Information by editing existing information. To edit existing information follow these steps:

**Note:**

*The contact information corresponds to the person designated as the contact for the Lead Agency. The Contact Information includes, Name, Title, Phone Number, FAX Number, Email Address, as well as Lead Agency Roles and Financial Status Report Approver Level.*

1. Log on to the SRIS.
2. Click on the [County Information](#) link in the left hand navigation bar. The County Information page will be displayed. See figure 2.1.



**Figure 2.1:**  
County  
Information  
Page.

Welcome to **California**     **HOLLYWOOD** 

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

**Alameda County** **Health Care Services Agency/Behavioral Health Care Services**

**County Information**

Lead Agency Information							
<b>Health Care Services Agency/Behavioral Health Care Services</b> 2000 Embarcadero Cove, Ste 400 Oakland , CA 94606-5300							

Contact Information							
	Name	Phone	Lead Agency Contact	Plan Contact	Financial Status Contact	Financial Status Approver 1	Financial Status Approver 2
<input type="radio"/>	Petralli, Shelli	555-555-5555	X		X	X	
<input type="radio"/>	Thomas, Marye	555-555-5555	X			X	X

3. Click the radio button next to the name of the contact person you wish to review.

4. Click on the **UPDATE CONTACT** button located at the bottom of the County Information page. Figure 2.2 is the **UPDATE CONTACT** button.

**Figure 2.2:**  
Update Contact  
Button.

Welcome to **California**     **HOLLYWOOD** 

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

**Alameda County** **Health Care Services Agency/Behavioral Health Care Services**

**County Information**

Lead Agency Information							
<b>Health Care Services Agency/Behavioral Health Care Services</b> 2000 Embarcadero Cove, Ste 400 Oakland , CA 94606-5300							

Contact Information							
	Name	Phone	Lead Agency Contact	Plan Contact	Financial Status Contact	Financial Status Approver 1	Financial Status Approver 2
<input type="radio"/>	Petralli, Shelli	555-555-5555	X		X	X	
<input type="radio"/>	Thomas, Marye	555-555-5555	X			X	X

**Update Contact Button** 





5. Update the necessary contact information on the View/Update Contact Information page and click the **SUBMIT** button to save the new data. Figure 2.3 displays the View/Update Contact Information page.

**Figure 2.3:**  
**View/Update**  
**Contact**  
**Information**  
**Page.**

**Welcome to California**

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

**Alameda County** **Health Care Services Agency/Behavioral Health Care Services**

**View/Update Contact Information**

To update Contact Information for this Lead Agency, enter the contact information and click the *Submit* button.

**Contact Information**

**Name:** (First & Last Name) John Doe

**Job Title:**

**Phone:** 800 - 555 - 5555 **Ext:**

**Fax:**  -  -

**Pager:**  -  -

**Mobile Phone:**  -  -

**Email Address:** tbox@adp.state.ca.us

**Lead Agency Roles:**

☒ Lead Agency Contact

☒ Plan Contact

☐ Financial Status Report Contact

☐ Financial Status Report Approver Level 1

Effective Date (From - Through):  /  /  -  /  /

☒ Financial Status Report Approver Level 2

Effective Date (From - Through): 01 / 30 / 2003 -  /  /

**Notes**

### Adding a New Contact

County users may also add new contacts from the Update Contact Information.

1. Log on to the SRIS.
2. Click on the [County Information](#) link in the left hand navigation bar. The County Information page will be displayed. See figure 2.4.



**Figure 2.4:**  
County  
Information  
Page.

Department of Alcohol and Drug Programs **SACPA Reporting Information System**

Alameda County Health Care Services Agency/Behavioral Health Care Services

**County Information**

**Lead Agency Information**

Health Care Services Agency/Behavioral Health Care Services  
2000 Embarcadero Cove, Ste 400  
Oakland , CA 94606-5300

**Contact Information**

	Name	Phone	Lead Agency Contact	Plan Contact	Financial Status Contact	Financial Status Approver 1	Financial Status Approver 2
<input type="radio"/>	Petralli, Shelli	555-555-5555	X		X	X	
<input type="radio"/>	Thomas, Marye	555-555-5555	X			X	X

3. Click **ADD NEW CONTACT** button. The Add Lead Agency Contact page is displayed. Figure 2.5 is the **ADD NEW CONTACT** button.

**Figure 2.5:** Add  
New Contact  
Button.

Department of Alcohol and Drug Programs **SACPA Reporting Information System**

Alameda County Health Care Services Agency/Behavioral Health Care Services

**County Information**

**Lead Agency Information**

Health Care Services Agency/Behavioral Health Care Services  
2000 Embarcadero Cove, Ste 400  
Oakland , CA 94606-5300

**Contact Information**

	Name	Phone	Lead Agency Contact	Plan Contact	Financial Status Contact	Financial Status Approver 1	Financial Status Approver 2
<input type="radio"/>	Petralli, Shelli	555-555-5555	X		X	X	
<input type="radio"/>	Thomas, Marye	555-555-5555	X			X	X


**Add New Contact Button**

4. Choose from the **User Name** box, and click the **SUBMIT** button. This will open the Update Contact Information page. Figure 2.6 is the Add Lead Agency Contact page.



**Figure 2.6: Add Lead Agency Contact Page.**

Department of Alcohol and Drug Programs      SACPA Reporting Information System

Alameda County      Health Care Services Agency/Behavioral Health Care Services

**Add Lead Agency Contact**

To add a new Contact to the Lead Agency, select a *User Name* and click the *Submit* button.

User Name:

### Entering and Updating Lead Agency Roles

County users can go to the Update Contact Information page to enter or update Contact Information, Lead Agency Roles, and Financial Status Report Approver Level.

1. Log on to the SRIS.
2. Click on the [County Information](#) link in the left hand navigation bar.
3. Click the radio button next to the name of the contact you wish to review.
4. Click on the **UPDATE CONTACT** button located at the bottom of the County Information page.
5. Update the necessary contact information on the View/Update Contact Information page and click the **SUBMIT** button to save the new data. Figure 2.7 is the View/Update Contact Information page.





**Figure 2.7:**  
View/Update  
Contact  
Information  
Page.

Welcome to **California**

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

Alameda County Health Care Services Agency/Behavioral Health Care Services

**View/Update Contact Information**

To update Contact Information for this Lead Agency, enter the contact information and click the *Submit* button.

**Contact Information**

**Name:** (First & Last Name) John Doe

**Job Title:**

**Phone:** 800 - 555 - 5555 **Ext:**

**Fax:**  -  -

**Pager:**  -  -

**Mobile Phone:**  -  -

**Email Address:** tbox@adp.state.ca.us

**Lead Agency Roles:**

☒ Lead Agency Contact

☒ Plan Contact

☐ Financial Status Report Contact

☐ Financial Status Report Approver Level 1

Effective Date (From - Through):  /  /  -  /  /

☒ Financial Status Report Approver Level 2

Effective Date (From - Through): 01 / 30 / 2003 -  /  /

**Notes**

6. Check the box(es) that represents the type of information the contact is responsible for. Counties may have more than one contact for each role and contacts can have multiple roles. See Figure 2.8.



**Figure 2.8: Lead Agency Roles Checkboxes.**

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

**Alameda County** **Health Care Services Agency/Behavioral Health Care Services**

**View/Update Contact Information**

To update Contact Information for this Lead Agency, enter the contact information and click the **Submit** button.

**Contact Information**

**Name:** (First & Last Name) John, Doe

**Job Title:**

**Phone:** 800 - 555 - 5555 **Ext:**

**Fax:**  -  -

**Pager:**  -  -

**Mobile Phone:**  -  -

**Email Address:** tbox@adp.state.ca.us

**Lead Agency Roles:**

☒ Lead Agency Contact

☒ Plan Contact

☐ Financial Status Report Contact

☐ Financial Status Report Approver Level 1

Effective Date (From - Through):  /  /  -  /  /

☒ Financial Status Report Approver Level 2

Effective Date (From - Through): 01 / 30 / 2003 -  /  /

**Notes**

7. For a county contact that is a Financial Status Report Approver Level 1 or Level 2, check the appropriate box and enter an effective-from date. The effective-from date must be later than 5-1-01, and must be before the effective-through date. See figure 2.9



**Figure 2.9:**  
Financial Status  
Report  
Approver Level  
Designations.

Welcome to **California**

**Department of Alcohol and Drug Programs** **SACPA Reporting Information System**

Alameda County Health Care Services Agency/Behavioral Health Care Services

[View/Update Contact Information](#)

To update Contact Information for this Lead Agency, enter the contact information and click the [Submit](#) button.

**Contact Information**

**Name:** (First & Last Name) John, Doe

**Job Title:**

**Phone:** 800 - 555 - 5555 **Ext:**

**Fax:**  -  -

**Pager:**  -  -

**Mobile Phone:**  -  -

**Email Address:** tbox@adp.state.ca.us

**Lead Agency Roles:**

☒ Lead Agency Contact

☒ Plan Contact


☐ Financial Status Report Contact

☐ Financial Status Report Approver Level 1

Effective Date (From - Through):  /  /  -  /  /

☒ Financial Status Report Approver Level 2

Effective Date (From - Through): 01 / 30 / 2003 -  /  /

**Financial Status Report Approver Level Designations** 

**Notes**

**Note:**

*The approver cannot set the Financial Status Report Approver Level 1 and Level 2 designations. Any other county user with a Username and Password can designate the approver as either Level 1 and/or 2. To end a user's approver rights, enter a through-date that is on or after the date you wish to end approver's rights.*

8. Click the **SUBMIT** button. The Contact Information page is re-displayed with updated contact information.